Modifications and New Features in CM/ECF

Live 06/28/10

Attorney Guide

<u>Introduction</u>:

Effective June 28, 2010 you will notice many differences in the CM/ECF menu screens and event functions. This handout can be used as a tool to become familiar with the changes listed below and how they will affect you.

New User Interface

Civil Case Opening:

The Nature of Suit and Cause of Action fields have been modified to permit the user to filter the items displayed in the pick list. The user can enter characters in the Filter field, which immediately narrows the drop down list to just the items that match the string entered. To change the filter, the user can type over the characters already entered, or click the Clear filter button, which returns the contents of the drop down to the complete list:

Open Civil Case

Jurisdiction	3 (Federal Question)
Cause of action	42:1983cv (42:1983 Civil Rights Act) Filter: 42:1983 [Clear filter]
Nature of suit	42:1983cv (42:1983 Civil Rights Act) / 42:1983ed (42:1983 Civil Rights (Employment Discrimination) / 42:1983pr (42:1983 Prisoner Civil Rights) Filter: [Clear filter]
Origin	(Original Proceeding)
Citizenship plaintiff	
Citizenship defendant	
Jury demand	n (None) Class action n Demand ($000)
Arbitration code	County Sacramento
Fee status	pd (paid) Fee date 6/11/2010 Date transfer

[Next] [Clear]

Adding Parties, Editing Case Participants:

The next screen in civil case opening employs the new user interface. The left partition contains the controls to **Add New Party** and **Create Case**:

[Add New Party]   [Create Case]
Collapse All   Expand All

Search for a party
Last / Business Name Smith   First Name John   Middle Name
Prisoner ID

[Search]

Search Results
Smith, John R.
Smith, John
Smith, John A.
Smith, John
Smith, John
Smith, John D

[Select Party]   [Create New Party]

Case Participant Tree:

The tree will be located in the left partition of the screen. The following is a list of new icons that will appear in the tree:

 Delete this party from this case.

 Add new alias, corporate parent, or attorney.

 Copy attorney(s) from other parties in the case to this party.

 Edit the party, alias, corporate parent, or attorney. Only displays beside actual names of participants, so if no participant has been added, this icon is suppressed.

 Change the name of the party.

The Participant Tree allows the user to view a list of participants added to the case while docketing either in collapsed or expanded form:


To add information to the party once they are a party to the case, click on appropriate icon beneath their name. The user may add an attorney by clicking on the attorney icon under the party name, as well as copy an attorney from one party and add to another (if applicable). The user may also delete a party by clicking on the delete icon (red X) next to the party name. Once all parties have been added, click on **Create Case** above the parties in the left partition and the case will be opened.

Note: If the user clicks the Back button from the participant processing screen, then clicks on the Forward button **without** making any changes, the participants will remain in the participant tree. The user will be able to continue adding and modifying participants. If any changes are made on the previous screen, the participant tree will be cleared.

Documents and Attachments:

The process of adding a main document and attachments has been streamlined into one screen:

As the user adds attachments, a new row will appear to allow another attachment to be added. If there is not another attachment to add, simply click on Next. If the attachment should be removed, click on Remove to the right of the row. If the user clicks on Clear, all documents will be cleared and the screen will return to the default state.

Miscellaneous Modifications

Query Screen and Docket Sheet Report:

The Query screen has been modified to provide more options for more refined searches, allowing users to run a query for a Cause of Action. The Docket Sheet Report now allows users to select a time period when running a report for a docket with a large amount of entries:

Changes to User Email Information Screen:

When the user clicks on the Email Information button in the Maintain User Account screen, the Email Information screen has been modified to provide more streamlined functionality. The user now has the option to be noticed per filing, a summary report when there is activity, or a "no activity" notice when no summary noticing occurs. Select the radio button for the preferred option:

Registered e-mail addresses	Configuration options

Primary e-mail address:
  michael.jones@email.com
 	
Secondary e-mail addresses:
  add new e-mail address
 	
[Return to Person Information Screen]
[Clear]
	michael.jones@email.com
	
	Should this e-mail address receive notices? ⊙ Yes ○ No
	
	How should notices be sent to this e-mail address? ○ Per Filing ⊙ Summary Report
	
	Should this e-mail address receive a "no activity" notice when no summary noticing occurs? ○ Yes ⊙ No
	
	In what format should notices be sent to this e-mail address? ⊙ HTML ○ Text
	
	Should this e-mail address receive general announcement notices from this court? ⊙ Yes ○ No
	
	[Show all cases for this e-mail address] *(Copy case lists from here)*
	
	Case-specific options
	
	Add additional cases for noticing
	[ ]
	
	These cases will send notice *as a summary report. (default method)*
	2:10-cv-00004-FCD-KJM Davis v. Horton
	
	[Remove selected cases] [Change selected cases to notice per filing]
	
	These cases will send notice *per filing. (alternate method)*
	
	[Remove selected cases] [Change selected cases to notice as a summary report]

Combined Docket Report for Multiple Criminal Defendants:

Users can now run a combined Docket Report for a subset of criminal defendants in a multi-defendant case. A new checkbox will be displayed beneath the defendant list:

Docket Sheet

Case number [2:10-mj-2-1,2] [Hide Case List]
Select a case:
☐ 2:10-mj-00002-KJM USA v. Moreno et al ⊟
    ☑ 2:10-mj-00002-KJM-1 Jose Moreno (merged)
    ☑ 2:10-mj-00002-KJM-2 Roberto Garcia
☑ View Combined Docket Report

Color Coded Case Flags:

Case flags can now be color coded and may be used in the future:

CIVIL, CLOSED

U.S. District Court
Eastern District of California - Test Live System (Sacramento)
CIVIL DOCKET FOR CASE #: 2:09-cv-00086-GEB-KJM